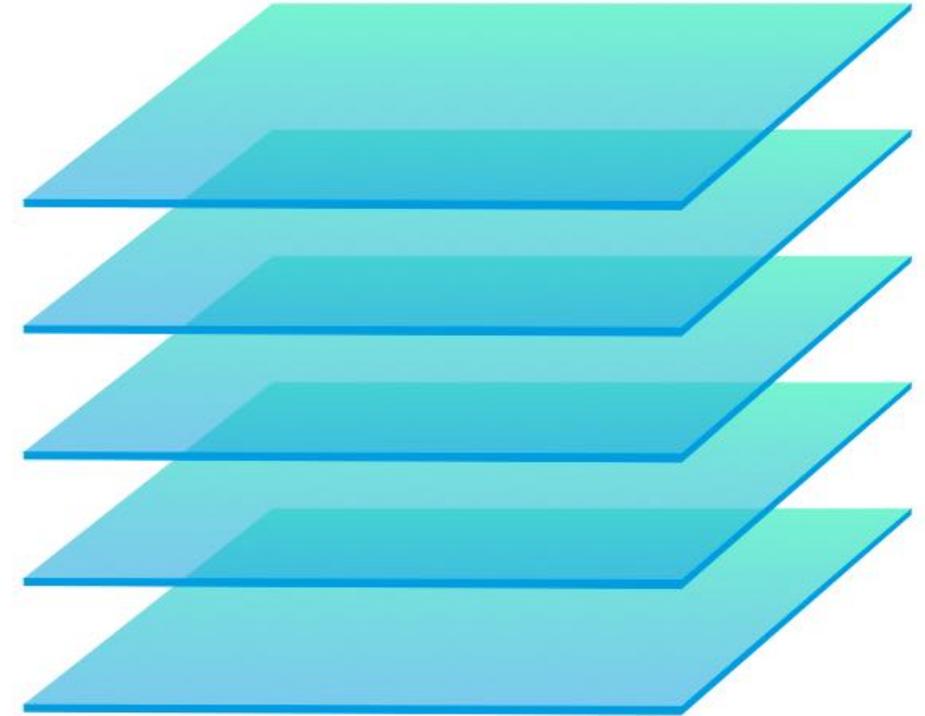


David Service

Business Agility, User-Experience (UX) Strategy, & Product Design

Selected Samples

Latest Revision: November, 2024.



10+

Years of UX Experience

\$85M+

Generated/Saved for Clients

65

Articles, Videos, & Reviews

The story so far...



I help organizations solve challenging business problems by delighting their users with meaningful, top-quality solutions across web, native apps, and service-based platforms.

For the past 10+ years, I've built, mentored, and worked with multi-disciplinary teams (large and small) to delight users, deliver targeted business outcomes, and promote, embed, and nurture a culture of digital craftsmanship to and foster deliberate, strategic innovation in the following industries:

- Life Sciences & Healthcare
- Education & School Administration.
- Legal & Intellectual Property Services.
- Creative Agency Services.
- Consumer Goods.
- Hospitality Services.

Recommendations (Selected) 3

Business Agility via UX Strategy: A Simple 3-Step Process..... 4

Case Study #1 : AstraZeneca 5
 May 2022 - July 2024

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Case Study #2 : Lexis Nexis IP 12
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Case Study #3 : Independent School Management 19
 November 2018 - June 2020

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Please Note: Additional case studies are available upon request, or browse to www.davidserviceux.com/casestudies.html



I'm proud to say that I personally recruited and hired David for my team and that it was one of the best hiring decisions I've ever made.

David's natural intellect, combined with an impeccable work ethic enabled him to quickly become a high performer, trusted and respected by both those within and outside of the UX team.

Merrill Zavod, PhD
Director of UX, AstraZeneca



It is without reservation that I recommend David Service for a role with your organization.

David worked collaboratively with our technical team, subject matter experts, and stakeholders to arrive at shared goals for project design and development, while he also worked diligently to create an inclusive atmosphere between all project team members.

Jenna Pingitore
Director of Operations, Independent School Management



David's work was vital for setting the foundation for the overhaul of our flagship product.

David is equally comfortable communicating at both executive meetings as well as with software development teams. This made David a valuable team member and a pleasure to work with.

Charles Rowe
Senior Technology Architect, Independent School Management



Less-experienced UX researchers and designers struggle with constraints...or they accept all constraints presented to them, without providing "healthy challenge" / validating constraints for themselves.

David doesn't suffer from either extreme. He's a brilliant UX Leader, validating needs and constraints for himself, and carving a path through them to great product design.

Tristram Smith
Transformation Programme Chief (Analytics), AstraZeneca



Working with David in his role as a UX Designer on our Global UX team has been an absolute pleasure. His exceptional design skills and problem-solving abilities consistently impress me.

In a rapidly evolving technological landscape, David's expertise is both broad and deep, allowing him to identify the most appropriate tools and approach for each project.

Katherine Wahl
Senior Digital Accessibility Specialist, AstraZeneca



David is an outstanding professional and always dives deeply in the projects he gets involved with.

He has a great talent not just for UX but on how to integrate it in a strategic way into business. He's definitely an asset to anyone looking for great user experience.

André Martins
Product Manager & UX Consultant, Springboard

Please Note: Additional recommendations are available upon request, or you can browse them all at <https://www.linkedin.com/in/david-service/>

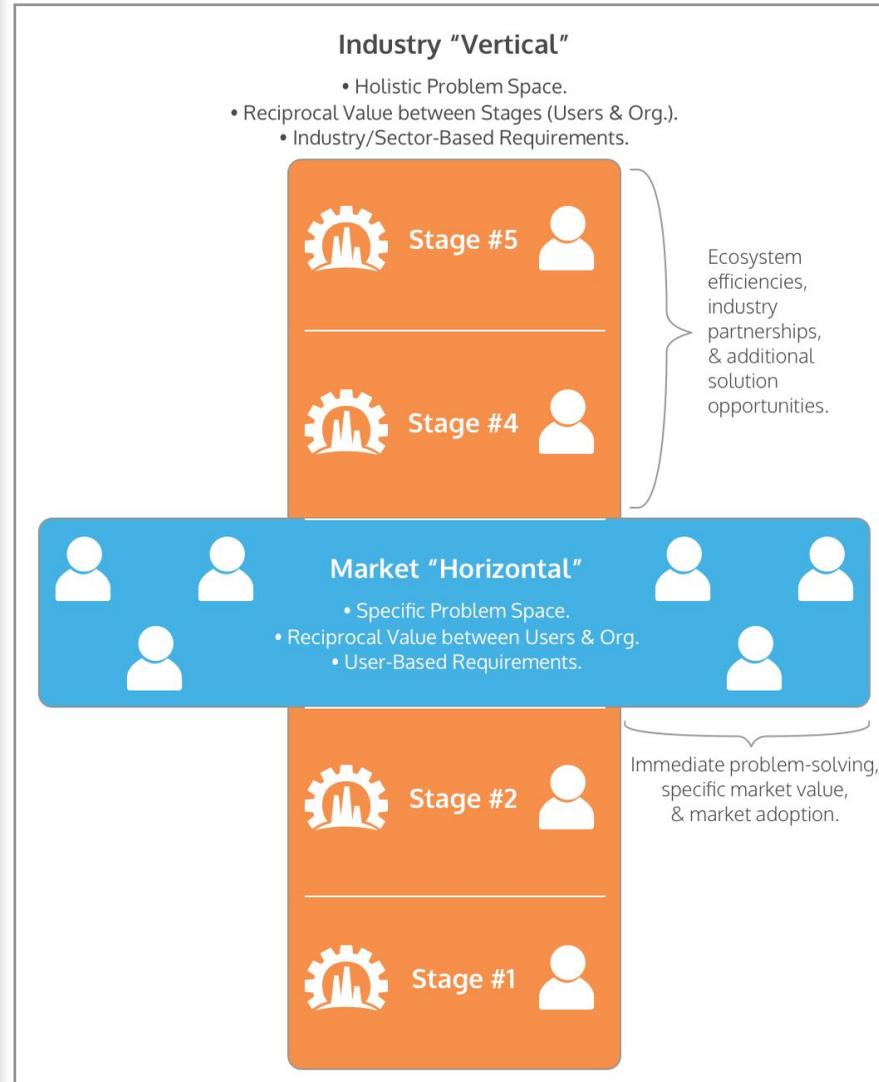
Business Agility via UX Strategy:

Think Big, Start Small, Scale Smartly

Business agility is a critical capacity for any organization; it is the ability to read market realities, adapt to them smoothly, and use that advantage to achieve market success in spite of ever-increasing competition and complexity.

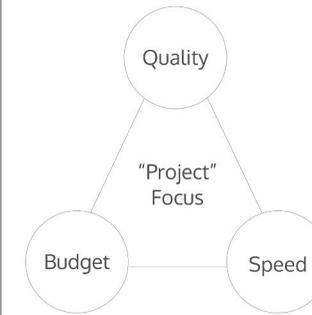
I help businesses and organizations achieve this agility through the timely and judicious application of UX Strategy; this enables an organization to deliver value to their users in a way that accounts for market realities, minimizes the risk of unanticipated complications, and increases the likelihood of market adoption.

Through this singular ability to provide user-centered value in a business-literate way, the organizations I have worked with have been able to achieve order-of-magnitude results against stiff competition and challenging markets.

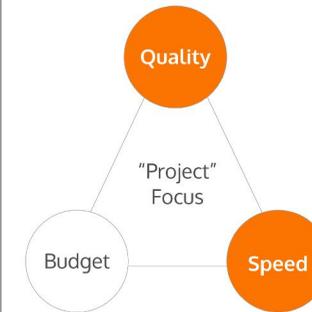
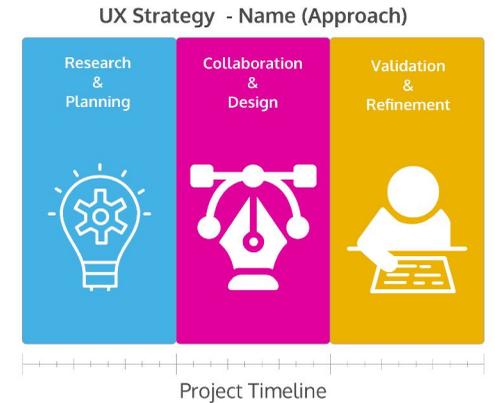


Thinking Big with Horizontals & Verticals - In these steps, our UX Research takes both the immediate user needs (i.e. to create immediate value) and the broader industry/sector implications (i.e. for larger efficiencies/synergies) into account.

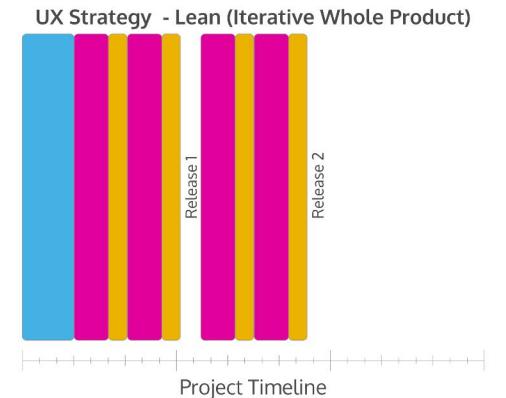
Business Constraints & UX Implementation Strategy



=

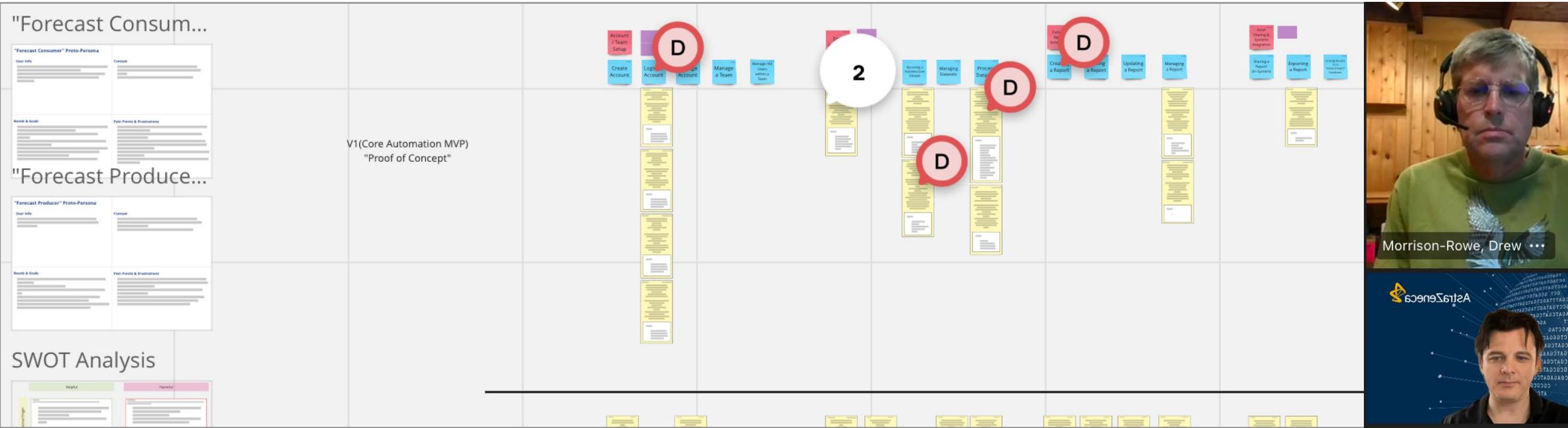


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Our Goals: • Initial Research Kick-Off. • Iterative UVP. • Quality-based "Market Segment" Approach.

Starting Small & Scaling Smartly - Competitive realities and business constraints are a fact of life, so UX Activities need to be flexibly used in a strategic way that takes those realities into account, so viable solutions can be delivered in a feasible manner.



About the Project:

May 202 - July 2024

A global innovator across research & development, therapy leadership, and healthcare delivery, AstraZeneca has positioned itself to create and leverage emerging trends in the healthcare space.

To take advantage of this unprecedented opportunity, the company needed to move into new areas of software, product, and experience design with an industry-leading internal UX Design capability.

My Role:

I was initially recruited by the Director of UX in North America to help his team as a Senior UX Strategist & Product Designer, and after several successful projects within the first year, I was promoted to Senior UX Team Lead in charge of pursuing, pitching, and executing on new projects.

I had the pleasure of working with professionals from around the globe to advance UX advocacy, education, and deliver essential projects on-time and on-budget, while helping to expand and develop the internal UX team’s capabilities.

Results:

- **A.I./Machine-Learning integration into next-gen cancer diagnosis tool;** reduced diagnosis time from 3-4 days (manual-only) to 5-6 hours (first-pass A.I. with manual oversight).
- **Led UX team to design and build a new “smart” drug quality-control system;** reactive and predictive functionality saved more than \$1 million/month across North America, with international rollout scheduled.
- **Design team lead for C-Suite dashboard tools;** amalgamation of critical data from across the company into easy-to-use, powerful tools for strategic planning.

Research & Strategy

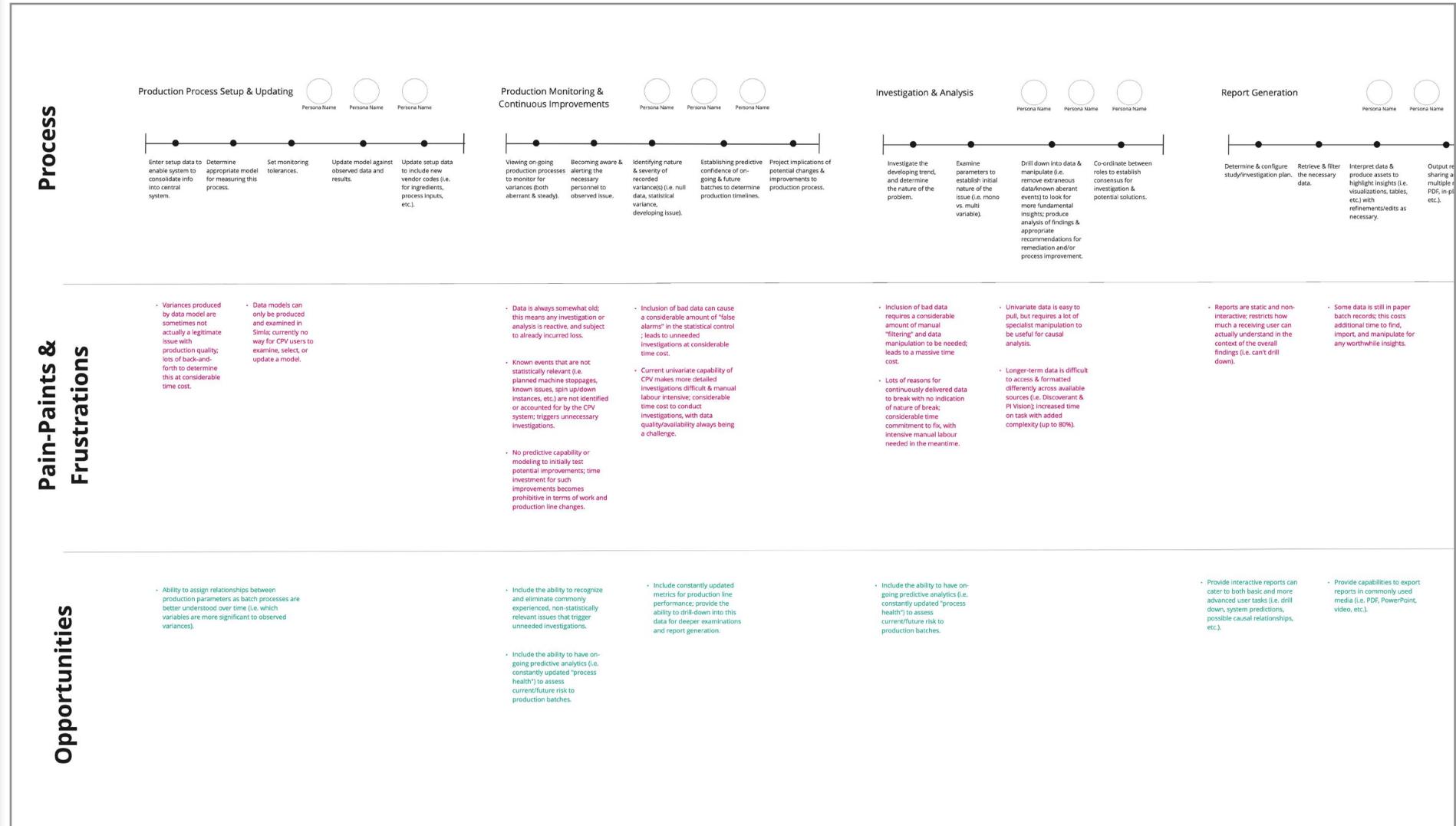
In a massive organization tackling many different initiatives, my initial projects focused on sharing potential product design approaches (i.e. UX strategies) with product teams.

By introducing the constituent elements of successful UX Design initiatives, and how we could use them in different combinations to achieve specific strategic approaches, the teams could move forward confidently no matter the business realities they faced or the potential limitations those realities introduced.

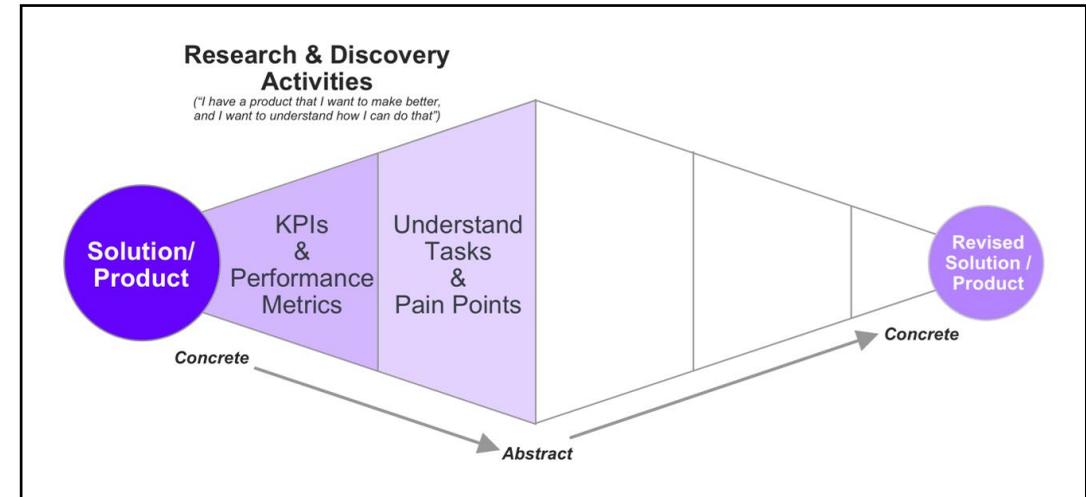
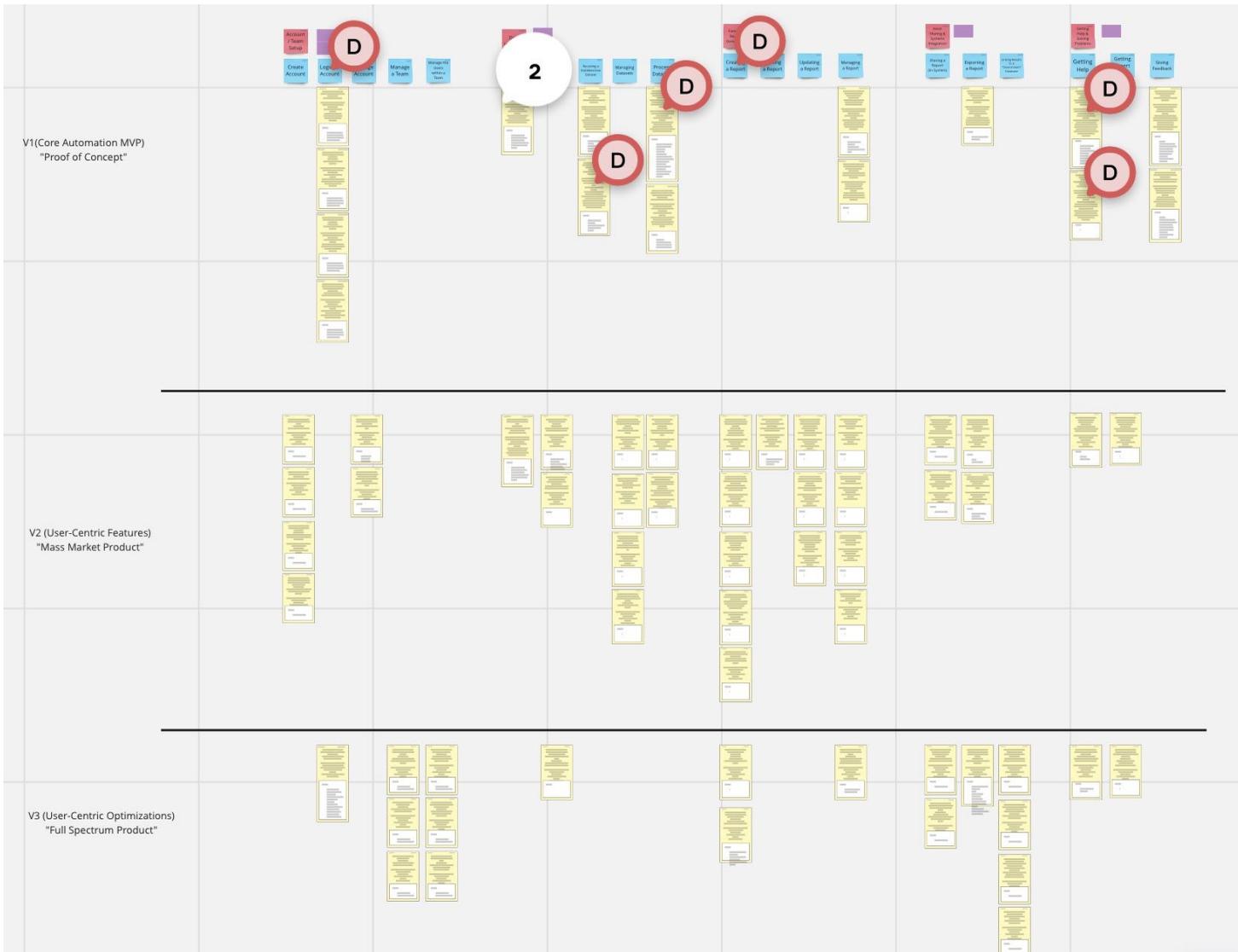
From formal research efforts to simple chats with stakeholders, strategies for feasible product development were agreed upon and used to deliver on pressing business needs.

Deliverables Included:

- Experience Maps.
- Story Maps
- Personas & Project Requirements.
- Educational Resources & Collaborative Infosessions.



Experience Mapping - For more complex projects that included multiple user-roles and touchpoints, broader Experience Maps were used to highlight the strengths, weaknesses, and potential opportunities within a problem space.



User-Story Mapping - To understand and account for requirements in a complex project, detailed Story Maps were collaboratively created by the UX Team and verified with stakeholders; this created clear priorities for design and development, and fostered project planning, co-operation, and interdisciplinary accountability.

Education & Collaboration - As UX Strategy was a new concept to most project teams at AstraZeneca, collaborative education sessions were created and leveraged to foster process improvement across the entire organization.

Collaborative Design & UX Team Leadership

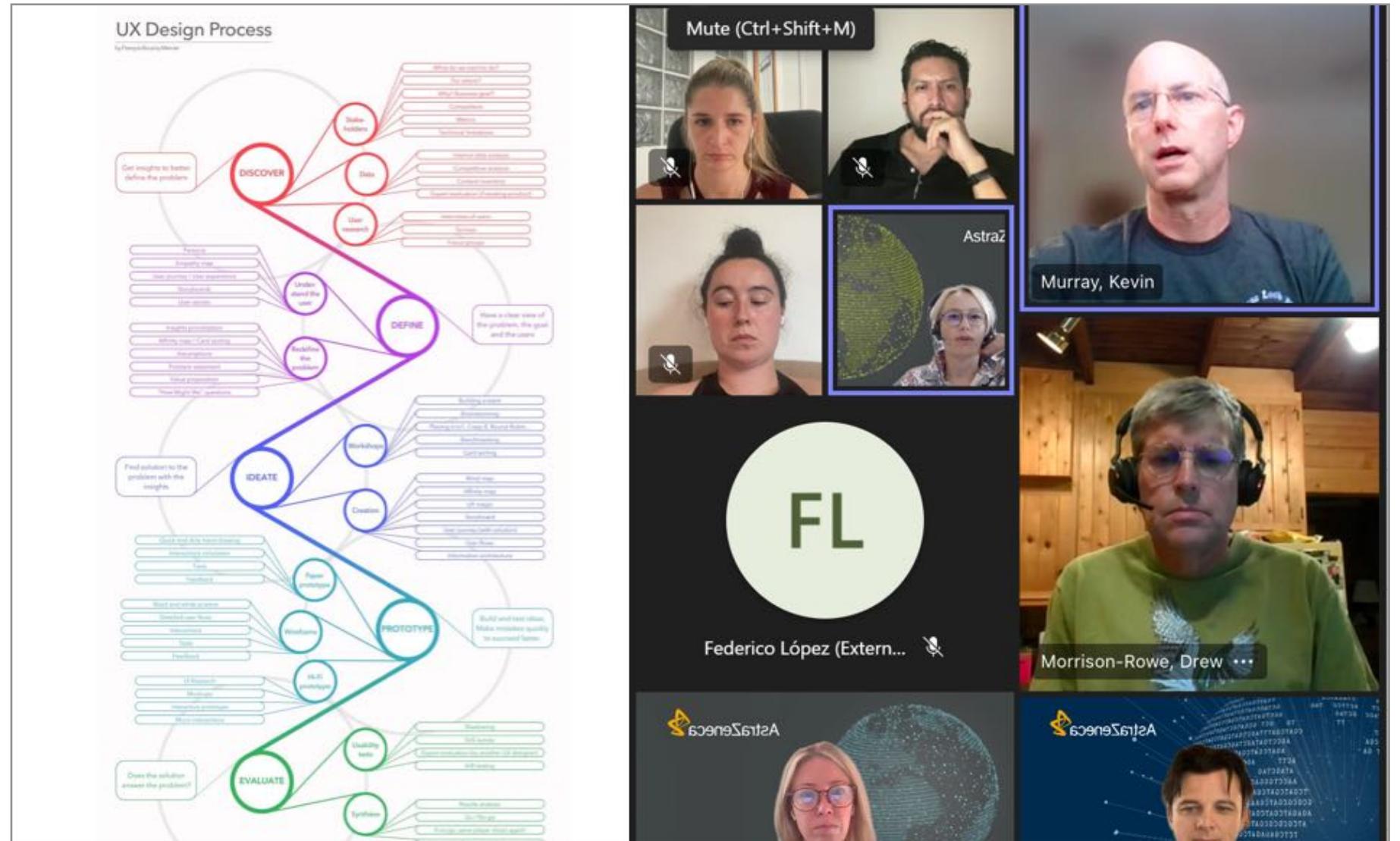
As any initial research and planning efforts were nearing completion, I would facilitate discussions between involved UX Team members and members of the project team so that we could begin enacting our desired approach.

Requirements were reviewed, quickly sketched out, and pressure-tested against the technologies they would be built with, which enabled us to leverage all of the expertise within the broader project team.

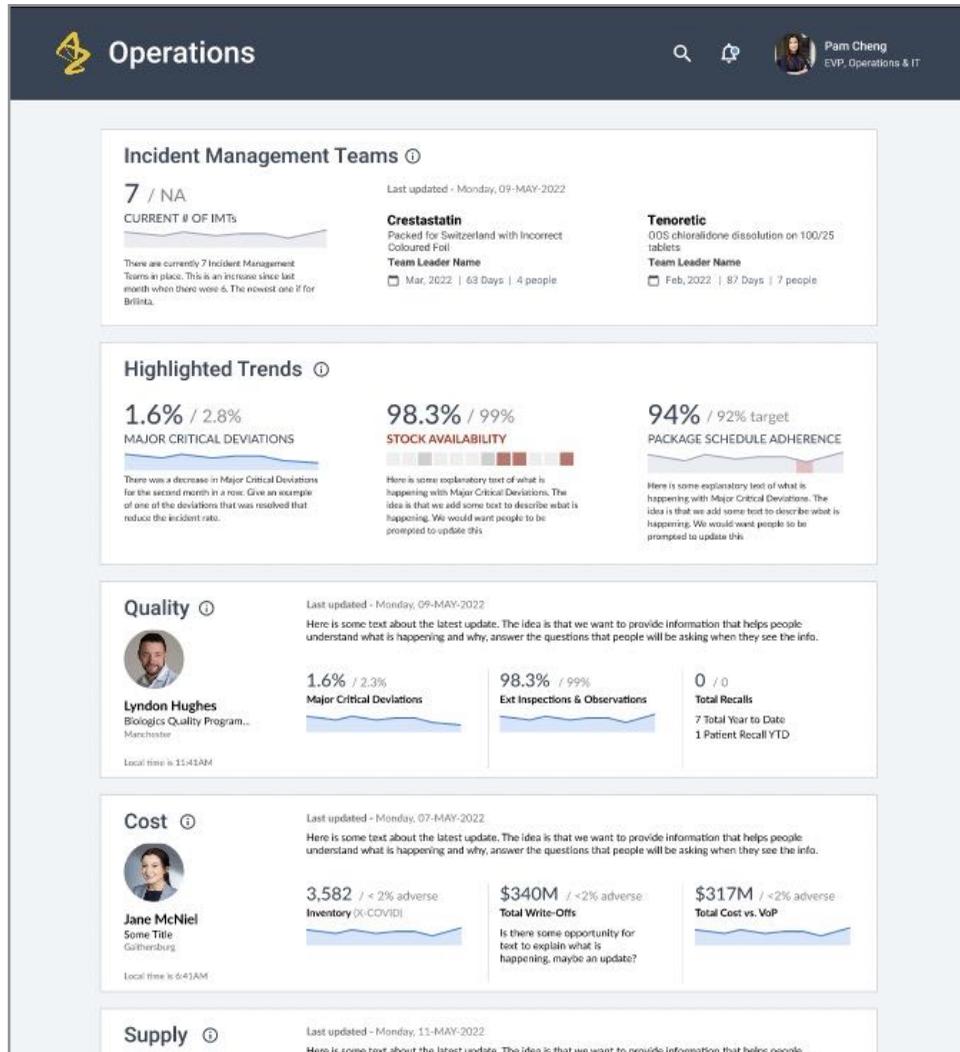
By using as open and collaborative a process as possible, potential challenges, changes, and complications could be swiftly addressed, ensuring that we could deliver on project goals within established timelines and resources.

Deliverables Included:

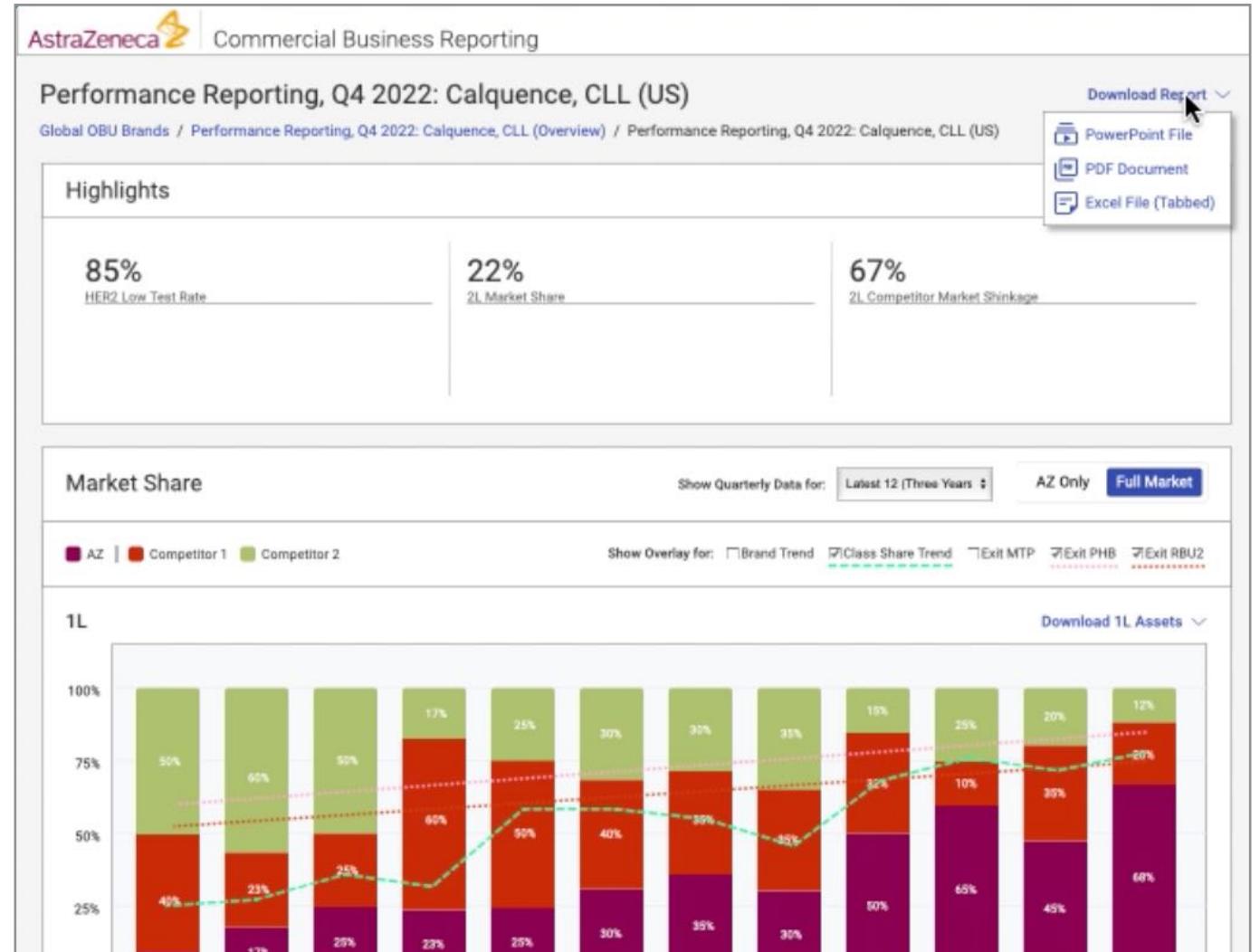
- UX Team Recruitment & Skills Development.
- User-Flows & Initial Concept Sketches.
- Detailed Product Mockups.
- High-Fidelity Prototypes.



UX Recruitment & Skills Development - As demand for the UX Team's involvement grew, I was tasked with helping to recruit new team members; once new teammates were brought on board, they were included in a broad array of activities to bolster their skillsets and gain valuable experience.



Product Mockups - After initial concept sketches were pressure tested, refined mockups were created; these could be used directly for development work, or further refined into prototypes for additional usability-testing.



High-Fidelity Prototypes - To ensure that users were getting the best experience possible, high-fidelity prototypes were exhaustively tested, demonstrated, and refined with that audience.

Testing & Validation

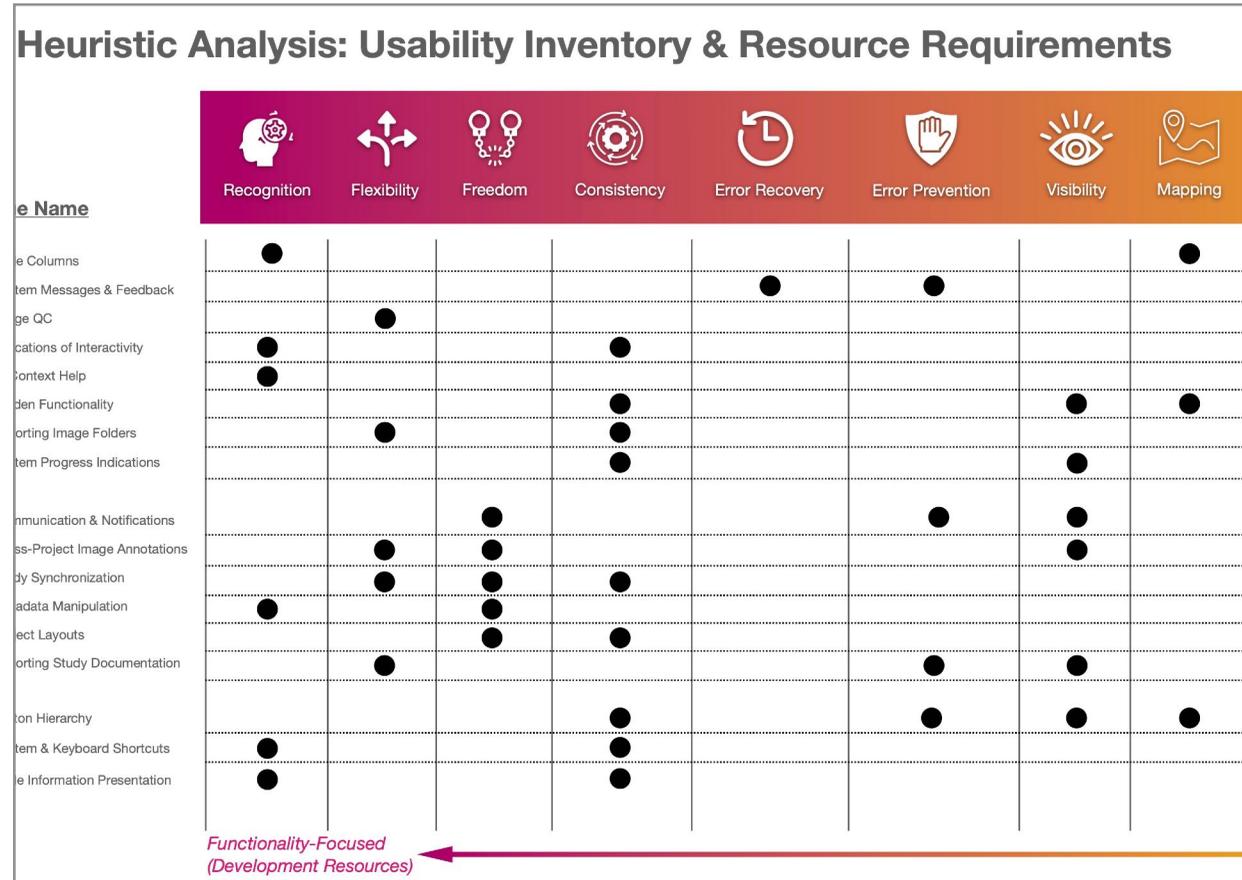
Wherever possible, our UX prototypes were stress-tested with users in order to validate and refine our work.

Ranging from formal efforts to hallway “guerilla-style” testing, this essential function was introduced across several product teams to ensure top-quality results.

Non-UX team members from each project were encouraged to join, observe, and participate in these efforts. By including as many teammates as possible, more usability-testing could be completed in a shorter time, ensuring the best results possible with limited resources.

Deliverables Included:

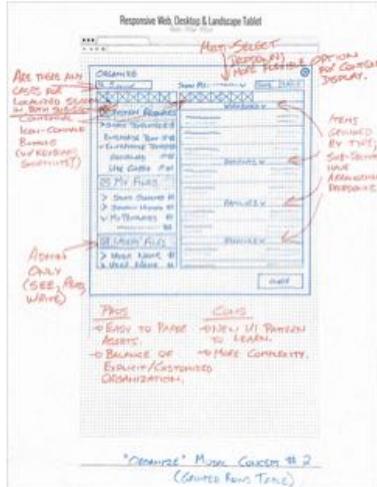
- Collaborative Process Improvements.
- Product Refinement Requirements & Prioritization.



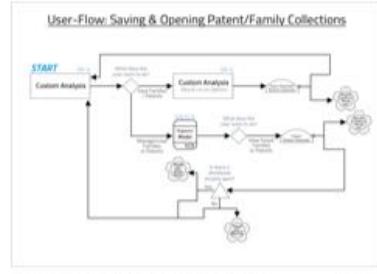
Heuristic Analysis - For existing products that needed optimization, a detailed Heuristic Analysis was used to prioritize efforts and the resources they would require.

Usability-Testing - Being able to clearly demonstrate how a digital product would work was often crucial for encouraging stakeholder confidence, and subsequently securing funding for further project development.

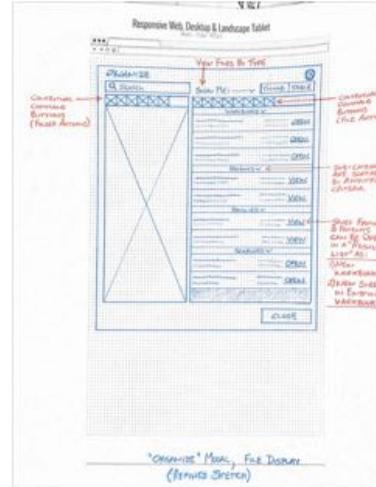
(PS/TP1) Folders & Tags



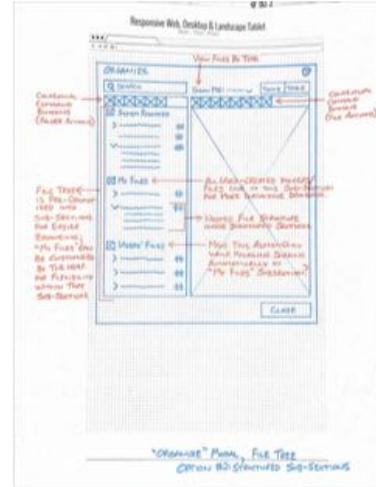
Organize Modal - Option #2 (Grouped Rows Table), Rough Ske... 4mth



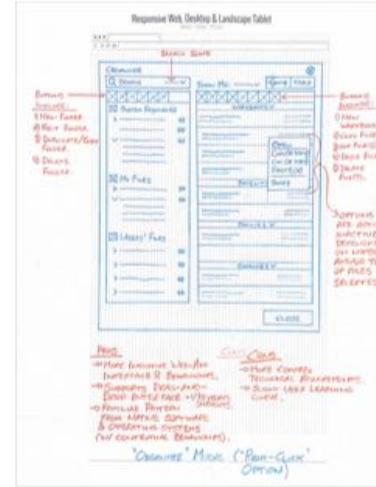
User-Flow: Saving & Opening Patent/Family Collections 4mth



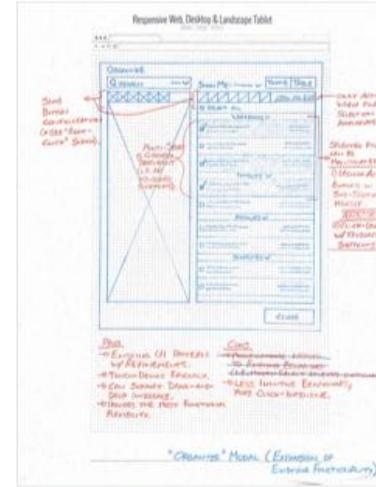
"Organize" Modal, File Display (Refined Sketch) 4mth



"Organize" Modal, File Tree (Option #2) 4mth



"Organize" Modal, Right-Click Option 3mth



"Organize" Modal, Expand Existing Option 3mth

About the Project:

April 2021 - May 2022

One of the earliest pioneers of information database services, LexisNexis is one of the world’s leading providers of legal, regulatory, and business analytics for a massive array of top-tier clients that shape the global economy.

Having recently acquired several new and diverse intellectual property software products, LexisNexis was faced with integrating these together into a comprehensive suite that was consistent and easy-to-use without disrupting the current user experience for thousands of clients.

My Role:

I was brought in to help a newly formed design team update the LNIP’s patent analytics software library, and introduce broader UX practices to an organization that was used to a more traditional software development approach.

Working with product teams, subject-matter experts, and users from around the world (North America, Europe, Asia), I successfully led the design effort to integrate the patent analytics products into the broader LexisNexis portfolio, include additional features, and optimize it for introduction to new international markets.

Results:

- **UX Research framework & accessibility/localization plan;** consolidated/expanded existing deliverables to coordinate Product teams’ efforts, and lead accessibility/localization efforts for market expansion.
- **Redesign of flagship IP software;** updated/expanded PatentSight software, enabling adoption by the USPTO.
- **Comprehensive Style Guide & Design System;** optimized design patterns were expanded into all IP products.

Research & Strategy

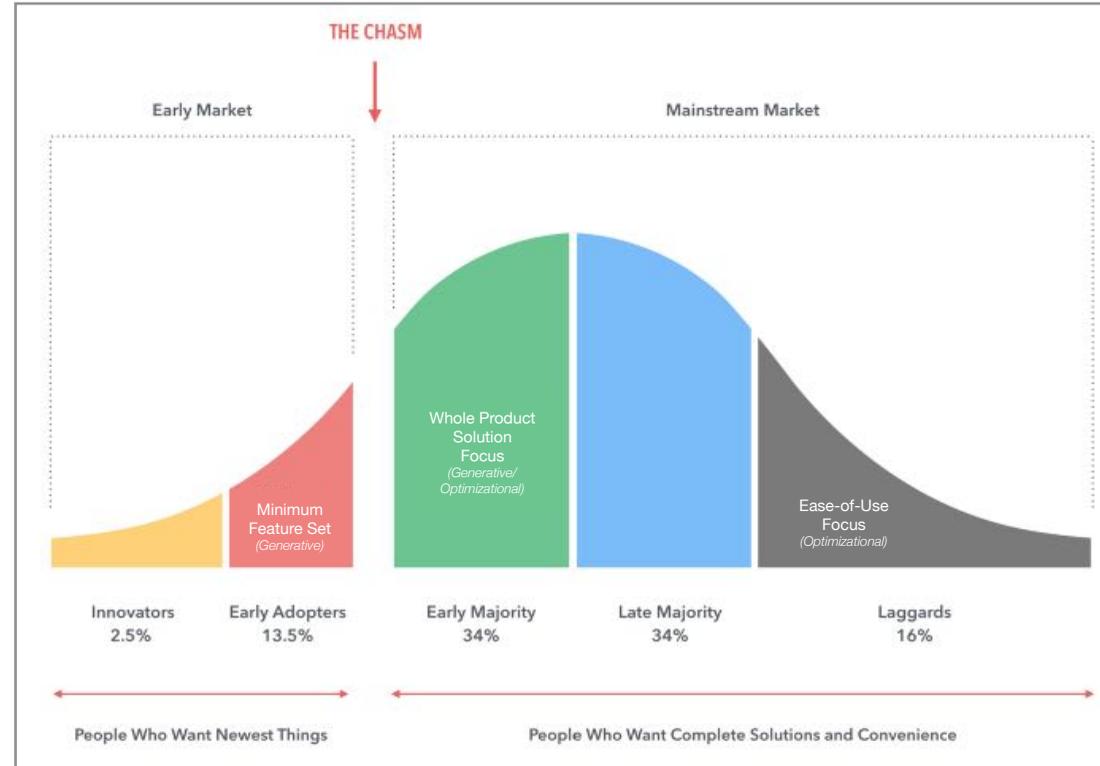
The first thing that the UX team had to do was understand the current state of the LexisNexis library of IP products, what position they occupied in the marketplace, and how we could move them forward.

By gathering together and synthesizing previous deliverables, subject-matter expert interviews, and current market metrics, the UX team formed a strategy to optimize and consolidate a varied library of software applications into a single coherent product family.

Our research findings were concentrated into an easy-to-access database for several product teams to access, delivered in newly standardized formats, and regularly shared with stakeholders to promote buy-in for UX activities.

Deliverables Included:

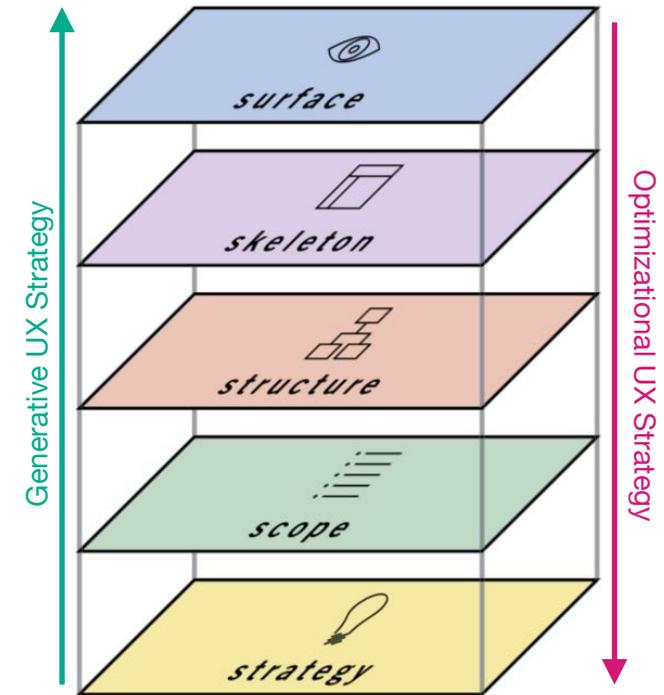
- UX "Optimization" Strategic Plan.
- Information Architecture & Product-Flows.
- Consolidated UX Research Database.



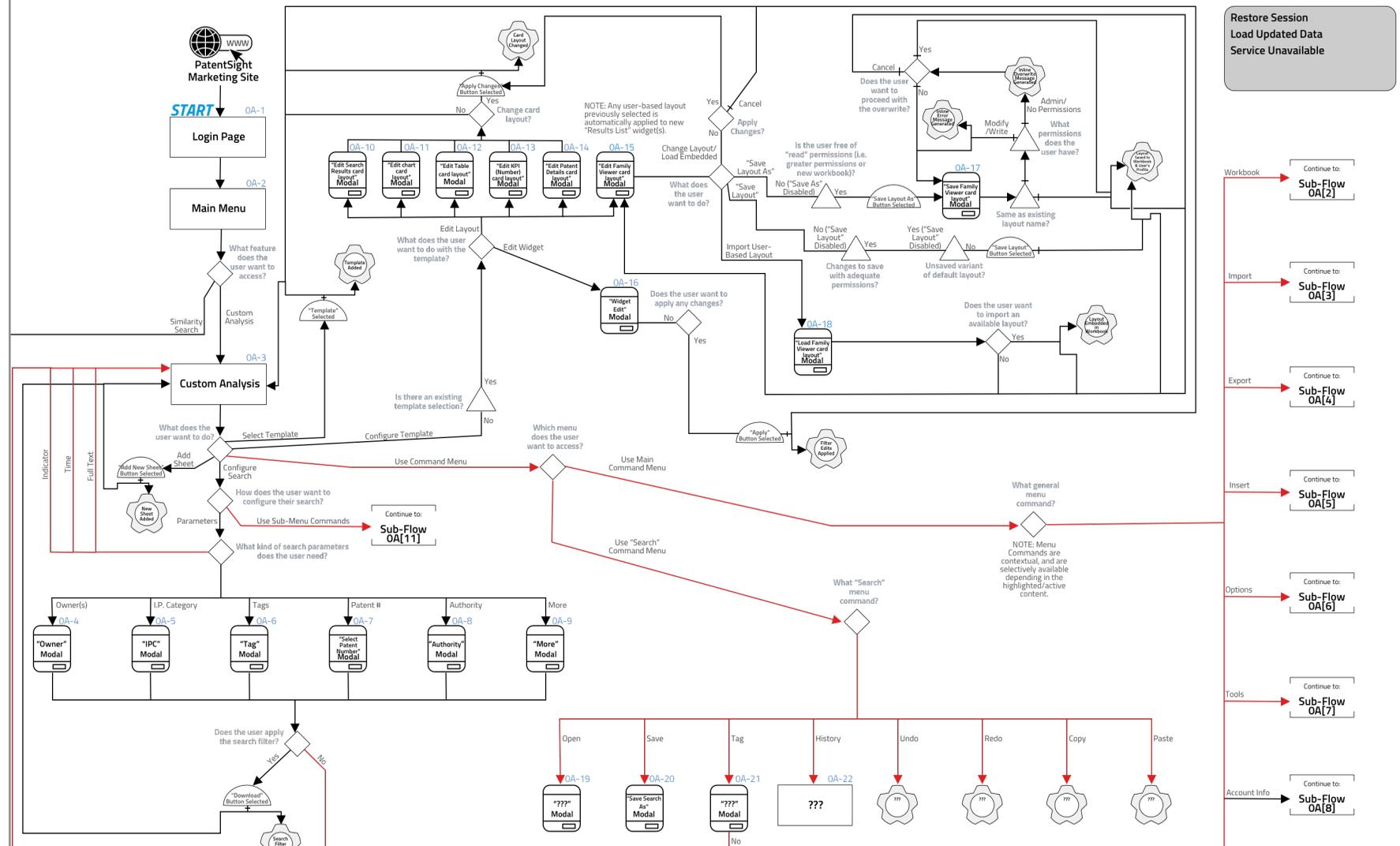
Generative UX Strategy
(Waterfall, Lean, Hybrid)

Optimizational UX Strategy
(UI Redesign, UX Analytics, Multi-Variate Testing, Feature Expansion)

UX Optimization Strategy - To streamline and standardize the LNIP product family for an existing base of users, the UX team researched where each product was in terms of its life cycle, and what feedback/metrics were available for synthesis; armed with this information from customers, stakeholders, and subject-matter experts, we formulated an "optimization" strategy to address these issues holistically.

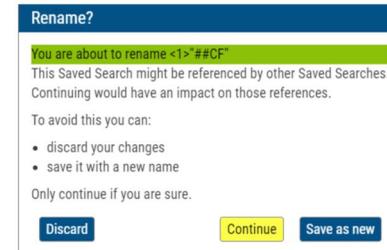
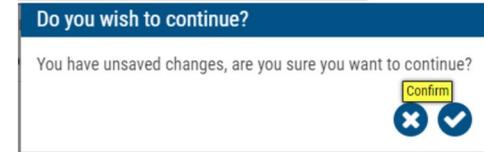
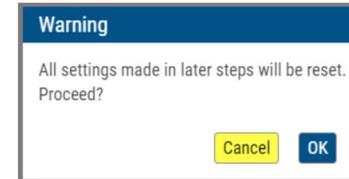


Product-Flow: Existing "Custom Analysis" Report (OA)



Confirm / OK

Sometimes we have "OK", other times we have the ✓ button with the tooltip "Confirm" or with no tooltip (I assume in situations with only one option). In all cases the meaning seems to be related if not the same.



Try again

This one is not a button, although it is clickable.



Product Flows, Heuristic Analysis, & User-Interface Audits - With a strategy in place, mapping out the application and its processes was the crucial first step for both understanding the information architecture, and having an element inventory; a thorough heuristics analysis and UI audit could be conducted so that elements could be standardized.

Design

With our initial research completed and a UX strategy in place, I began scoping out the production of a comprehensive Style Guide that included key accessibility/localization best practices.

Supplementary research was conducted to produce sketches, wireframes, prototypes, and a Style Guide document that would meet the complex needs of the IP analytics software family with an increasingly global marketplace.

From here, my team worked closely with our colleagues in development to build a quick-access Design System to streamline future coding workflows.

Deliverables Included:

- Accessibility & Localization Plan.
- Style Guide & Design System.
- Interactive Prototypes.

Level "AA" Compliance (Intermediate Accessibility)

Content Considerations

Readability

- Font selection for all localizations (LOC-120).

Color contrast is a minimum of 4.5:1.

- Test design patterns using WebAIM (webaim.org).

Consistent navigation.

- Primary Navigation.
- Secondary Navigation.
- Footer.

Code Considerations

Keyboard Navigation

- "Skip to Content" links.
- Consistent Tab Order for Nav/Screen elements.

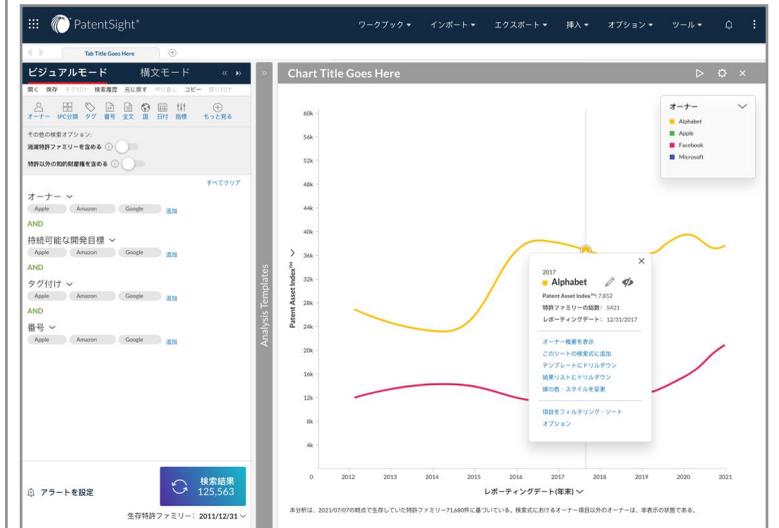
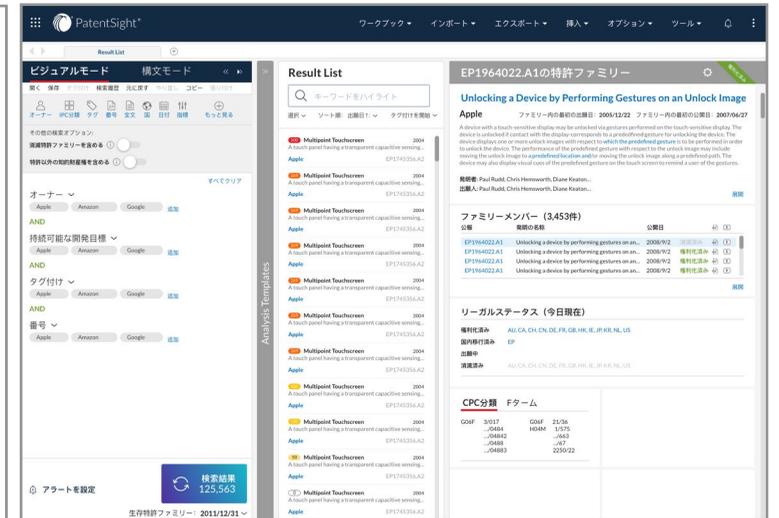
Image Optimization

- "Alt" text for images.
- Check for text in images (LOC-122).
- Ensure icon/text link pairing & localization (PS-7209).

Form/Settings Fields

- ID/FOR Pairing.
- Semantic Structure.
- Inline Validation.

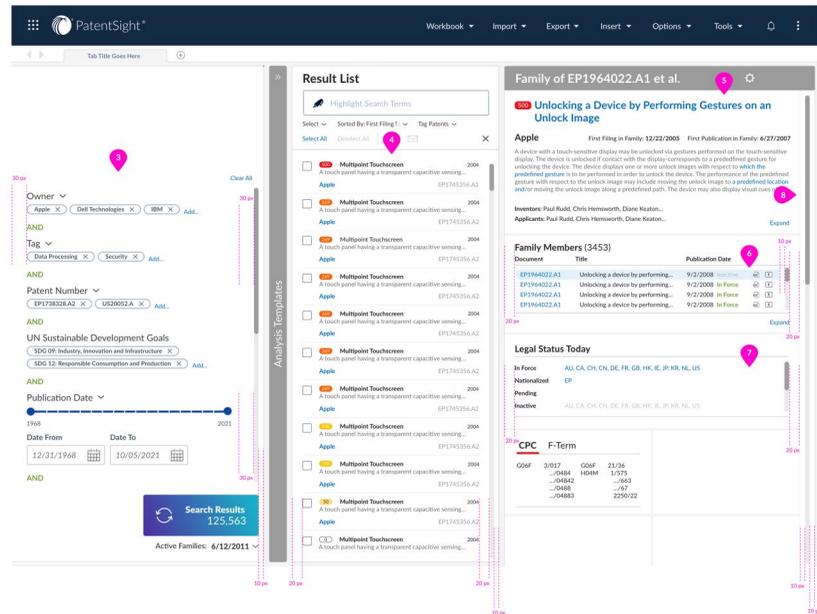
Status updates conveyed through ARIA



Accessibility & Localization - To successfully lay the groundwork for consistently optimizing LNIP products, clear accessibility and localization targets were produced so that all design elements were flexible enough to meet the needs of users across a broad spectrum of markets/abilities.

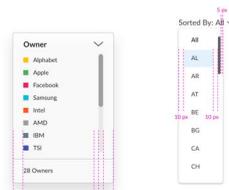
Contained Content Areas and Subsections

In this example, there are a mixture of contained content areas (3), (4), (5), and subsections without right and left borders (6), (7). In the contained content areas, the original margins are maintained and the scrollbar is 10px from the right edge of the container. Figure (9) is a unique case where we needed to create a dedicated area for the scrollbar since there are numerous full-width sections within this container. We added a horizontal rule (8) separating the scrollbar from the content. As you can see, there is still a consistent 20px margin between the content and the scrollbar area. Since the content areas within the subsections don't have left and right borders, the scrollbars are right aligned with the right edge of the content area.



Modals vs Drop-down lists

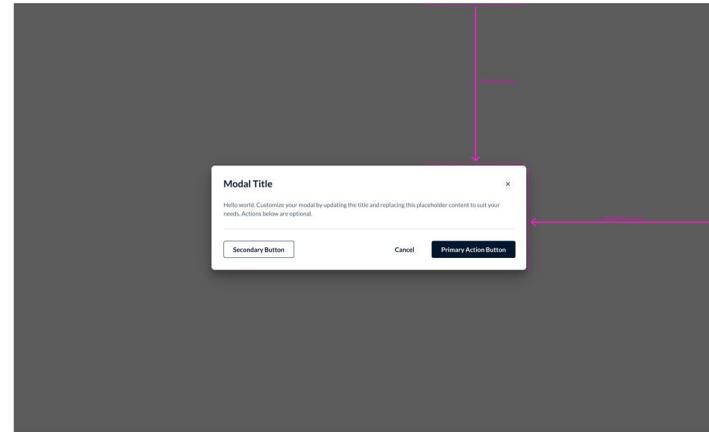
Within modals, the margins should remain consistent around the content and the scrollbars. Within drop-down lists, we use a smaller scrollbar component that is only 5px from the right edge of the DDL. There should be 10px between the selected item and the scrollbar.



MODAL PLACEMENT

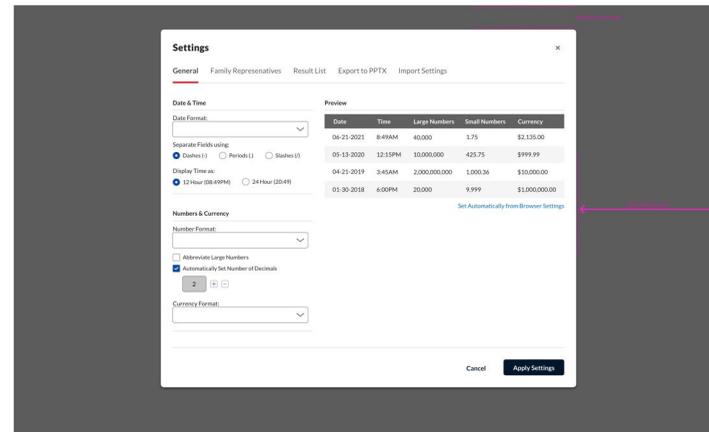
STANDARD MODALS

To maximize the prominence of modal placement so that users can recognize and act upon them effectively, all modals should be horizontally and vertically centered with the exception of tab-based modals, see below regardless of size.



TAB-BASED MODALS

To present a consistent user-experience and prevent modal "jumping" (i.e. the modal changing position to stay centered on the screen when different tabs are selected, a fixed distance of 60px from the top of the screen) should be used. The actual size of the modal can then be dependent on the content within it, and adjust its height accordingly.



Anchors

Anchor

src/components/primitives/anchor/Anchor.tsx 0

PROPS & METHODS

Anchor example:



VIEW CODE

Buttons

Button

src/components/primitives/button/Button.tsx 0

PROPS & METHODS

Dark Button examples:



VIEW CODE

Light Button examples:



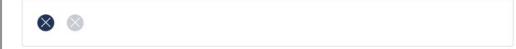
VIEW CODE

CloseButton

src/components/primitives/closeButton/CloseButton.tsx 0

PROPS & METHODS

Dark CloseButton examples:



VIEW CODE

Light CloseButton examples:



VIEW CODE

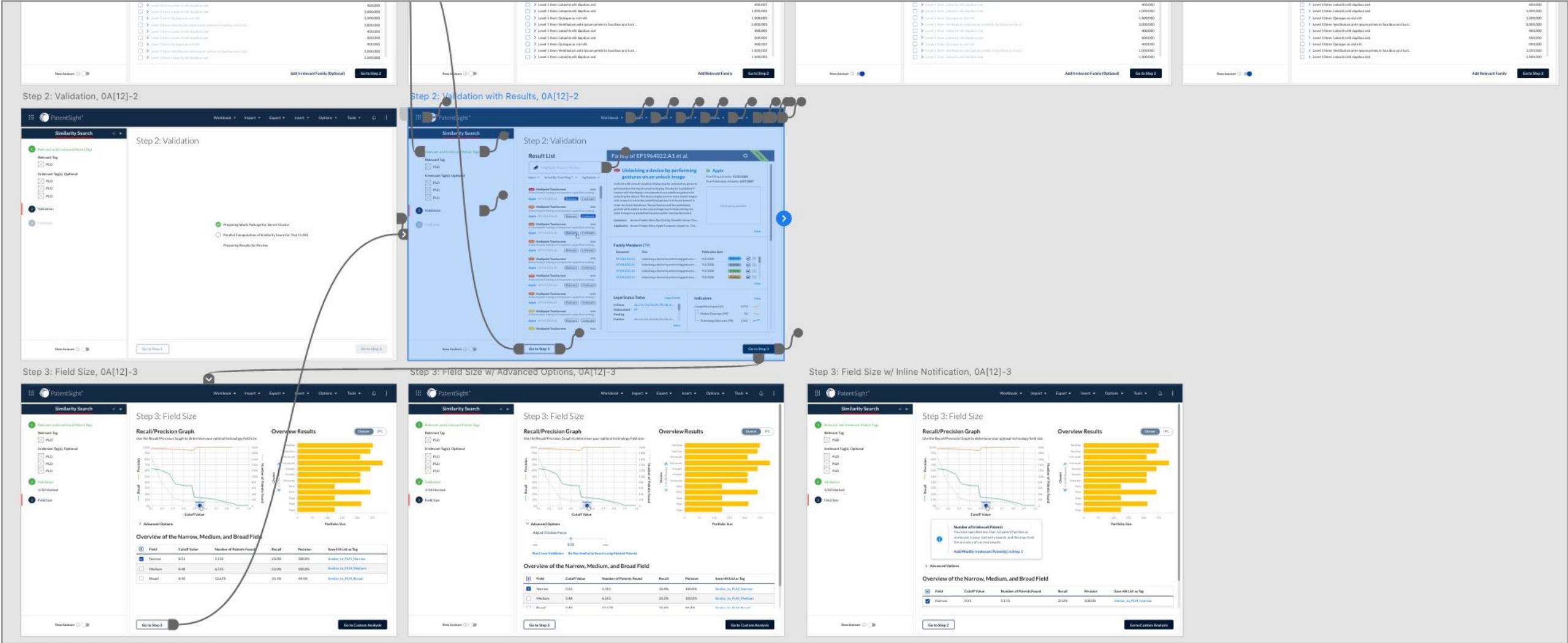
IconButton

src/components/primitives/iconButton/IconButton.tsx 0

PROPS & METHODS

IconButton examples: (This component is not finished, more properties should be added)

Style Guide & Design System - With accessibility and localization considerations in mind, the UX team build a highly-detailed Style Guide document to unify design patterns across all IP applications; these design rules/patterns were then coded into a Design System to streamline ongoing development work.



Interactive Prototypes - Using Adobe XD to produce mockups and clickable prototypes, the UX team tested every revised layout and feature exhaustively to ensure that users found the new designs understandable and easy-to-use; this was key to ensuring a better user-experience while aligning the product to overall LexisNexis brand standards.

Testing & Validation

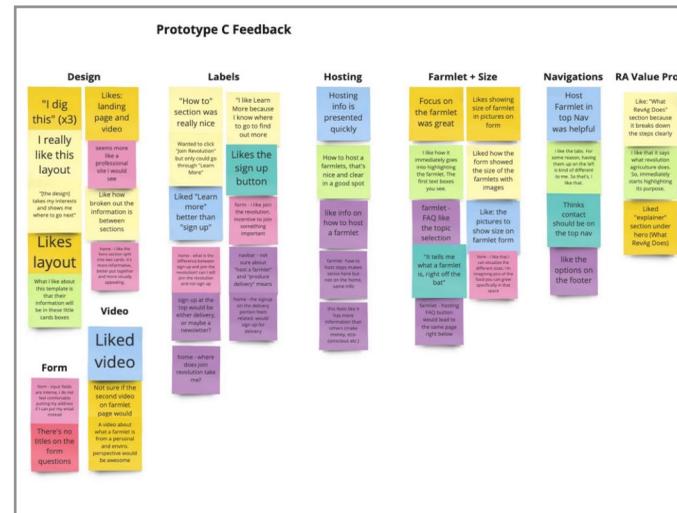
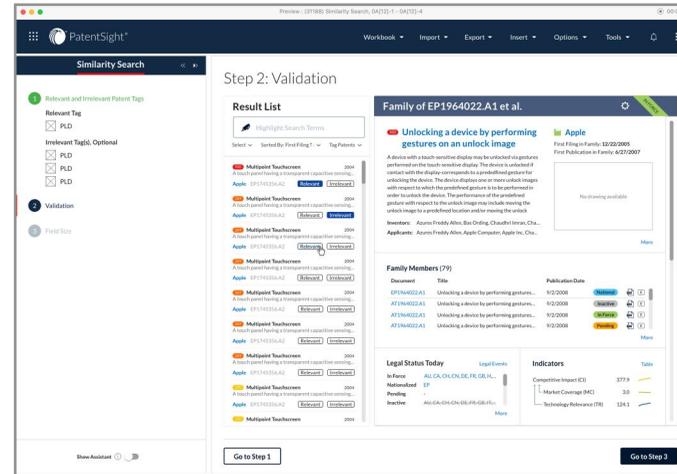
With a large and diverse body of users across the globe, frequent usability-testing was a key activity for driving design success across multiple markets.

Once redesigned interfaces and new features were tested, the UX team worked closely with the broader product team to identify, prioritize, and address any issues that presented themselves.

Apart from helping the UX team to validate designs and features, this was a critical shared activity that encouraged stakeholders, developers, and subject-matter experts to buy-in to further UX initiatives.

Deliverables Included:

- Usability-Testing.
- Process Feedback.
- Refinement Prioritization.



	A	B	C	D	E
	Priority	Issue Name	Issue Type	Status	Issue Details
1	High	Scrollbar Design	Style Guide Element(s)	Completed for Review	Positioning of scrollbars is inconsistent across to right border, while some are pushed left
2	High	Charts/Graphs	Style Guide Element(s)	To Do	Thumbnails that represent the new styling of the following: <ul style="list-style-type: none"> • Patent Asset Index Trend (Charts). • Portfolio Size Trend (Charts). • Quality vs. Quantity (Charts). • Relevance vs. Coverage (Charts). • Corporate Portfolio Strength (Charts). • PAI & Technology Share (Charts). • Sunburst Chart (Charts). • Technology Matrix (Charts). • Protected Authorities (Charts). • Value Distribution (Charts). • Expected Annuity Fees (Charts). • UN Sustainable Development Goals (Charts)
3	High	Date Range Slider	Style Guide Element(s)	Completed for Review	This input needs to be redesigned to include: <ul style="list-style-type: none"> • Show current date when slider handle is used • Show accompanying fields for input of specific dates • Use as a "playback" bar (i.e. showing specific range with ability to change range values as well)
4	Medium	Alert Tab Icon	Mockups Needed	In-Process w/ Peter	Mockups need to be produced showing: <ul style="list-style-type: none"> • Workflow of setting up a custom alert.
5	High	Alert Notifications	Style Guide Element(s)	Completed for Review	Additional elements are needed to account for: <ul style="list-style-type: none"> • In-context system messages (i.e. specific feedback for their own section).
6	High	Input Elements (Alignment)	Style Guide Element(s)	In-Process w/ David	Input elements need to be completed to include: <ul style="list-style-type: none"> • Alignment within surrounding layout. • Consistent/additional styles for text inputs • Inclusion of additional elements for navigation (e.g. arrows & loading animation)
7	Medium	"Select Patent Number" Modal	Mockups Needed	To Do	
8	High	Input Fields	Style Guide Element(s)	In-Process w/ David	We need to provide the following: <ul style="list-style-type: none"> • Text field sizes (i.e. standard, with icons, with dropdowns) • Text field styles (i.e. standard vs. login page) • Elimination of opacity-based colours from text inputs • Integration of Date-Picker field(s) initially
9					
10	High	Input Fields for Login Page	Mockups Needed	To Do	
		"PatentSight" Logo	Zeplin/Deliverable Issue	Approved Final	Dev Team needs a finished SVG version of the logo
		"Product Menu" Icon	Zeplin/Deliverable Issue	Approved Final	Dev Team needs a finished SVG version of the icon

Usability-Testing, Affinity Mapping, & Refinement Prioritization - After each round of usability-testing, issues were categorized and prioritized for additional design refinements and testing; an added benefit of involving the core product team in this effort was that it encouraged contributions from all team members, and fostered a sense of purpose and achievement.



About the Project:

November 2018 - June 2020

Serving private and independent schools around the world for over 40 years, Independent School Management (ISM) provides guidance and support that enables the best educational experience possible.

Facing increased competition in several aspects of its business, ISM was looking to re-invigorate their offerings with fresh value while keeping a close eye on streamlining their current operations.

My Role:

Initially brought on for a short-term consultation to help with UX Research & Discovery, I was asked to stay on for nearly 2 years to lead several subsequent product design efforts.

Working with in-house specialists, stakeholders, and a broad array of users, I built and mentored several dedicated product teams from scratch to perform in-depth research, product planning, and design.

Results:

- **Ground-up redesign of flagship software;** massively increased usability and decreased maintenance costs.
- **Streamlined digital Survey Product;** 300% increase in initial productivity (3 days to 1) & introduced new automated product offerings.
- **Content Strategy integration for Salesforce;** created unified data architecture across multiple departments.

Research & Strategy

The first stage of product planning took the form of intensive discovery research conducted over a 6-week period with users, stakeholders, and subject matter experts (SMEs).

From these findings, I was able to present a clear picture of the current marketplace, how it was being served, and where ISM had the ability to deliver value in an unprecedented way.

Once research was condensed into easy-to-reference deliverables, I guided the newly-formed team through the product planning process to determine version release goals and set timeframes for completion.

Deliverables Included:

- UX Discovery Research Reports & Presentation.
- Detailed Personas.
- User-Story Map & Delivery Plan.
- "Vertical" Analysis.
- Technical Specifications.

The School's Go-To
Lydia
Activities (FAST Related): Client on-boarding, Document verification, Client support, Internal staff/user management, Bug reporting.
Behaviours: Experienced, Inexperienced, Emotional, Analytical.

The Family-Support Expert
Alexa
Activities (FAST Related): Technical Support for Families, Process Guidance.
Behaviours: Experienced, Inexperienced, Emotional, Analytical.

The Operational Chief
Linda
Activities (FAST Related): Initial Setup, Review Applications, Handling appeals & alternate funding, Creating "waivers".
Behaviours: Experienced, Inexperienced, Emotional, Analytical.

The Executive Leaders
Tom & Claire
Activities (FAST Related): Application Parameters, Review Applications, Budget Sources, Generate Reports, Review Parameters.
Behaviours: Experienced, Inexperienced, Emotional, Analytical.

The Full-Process Guru
Jim
Activities (FAST Related): Initial Setup, Review Applications, Handling Appeals, Initial Family Guidance, Family Communication, Application Parameters.
Goals (FAST Related): Establish comprehensive F.A. application, Successfully Review & Award Applications, Review & Refine Financial Aid Policy.
Joys (with Current FAST): "Split"/Divorced parties' info is private, Ability to customize application parameters, Ability to add family members to application.
Pain-Points (with Current FAST): Cluttered interface & lack of scaling for devices, Searching "could be better", Exporting can be "tightened up".
Devices Used: Large Format TV, Desktop/Laptop, Smartphone.
Summary: Jim is a smart, hard-working individual that has his hands in every stage of the Financial Aid process. Building the application from established parameters, guiding families through the process, and reviewing individual applications, Jim is part of a small executive team that continually refines and improves how financial aid works in his school. Although the process basically works well, Jim is frustrated by the inability of FAST to be accessed on mobile devices. Being the key financial aid person at his school, coupled with being on the road frequently, Jim would like the ability to access his financial aid system anywhere so that he can respond quickly to changing circumstances.

"Extend" Products & Services
UNLIMITED SCALING: "Industry" Articles, Email Newsletter.
LIMITED SCALING: "Membership" Articles, Books, Events.

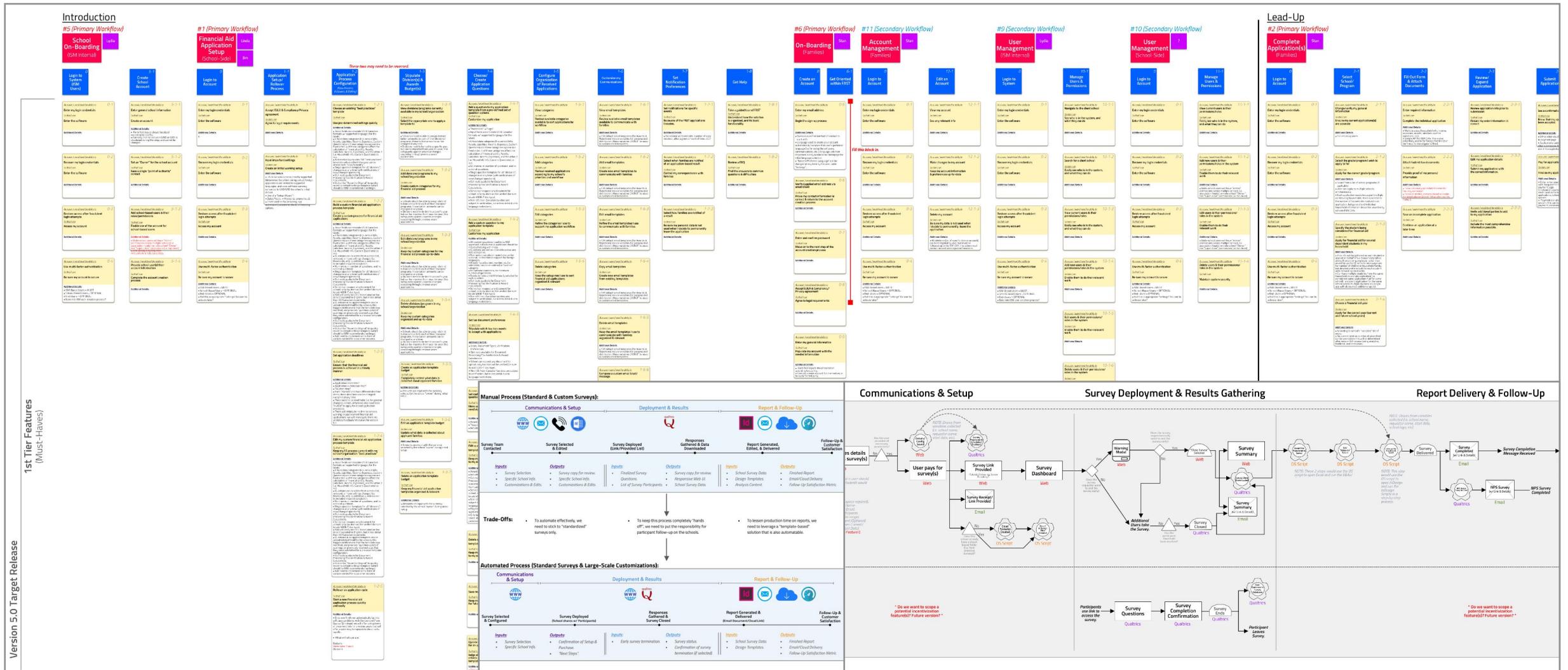
"Exit" Products & Services
UNLIMITED SCALING: Evaluative Surveys (Standard).
LIMITED SCALING: Evaluative Surveys (Custom).

"Engage" Products & Services
UNLIMITED SCALING: FAST, ScheduLogic.
LIMITED SCALING: International Circle, Advisory Services.

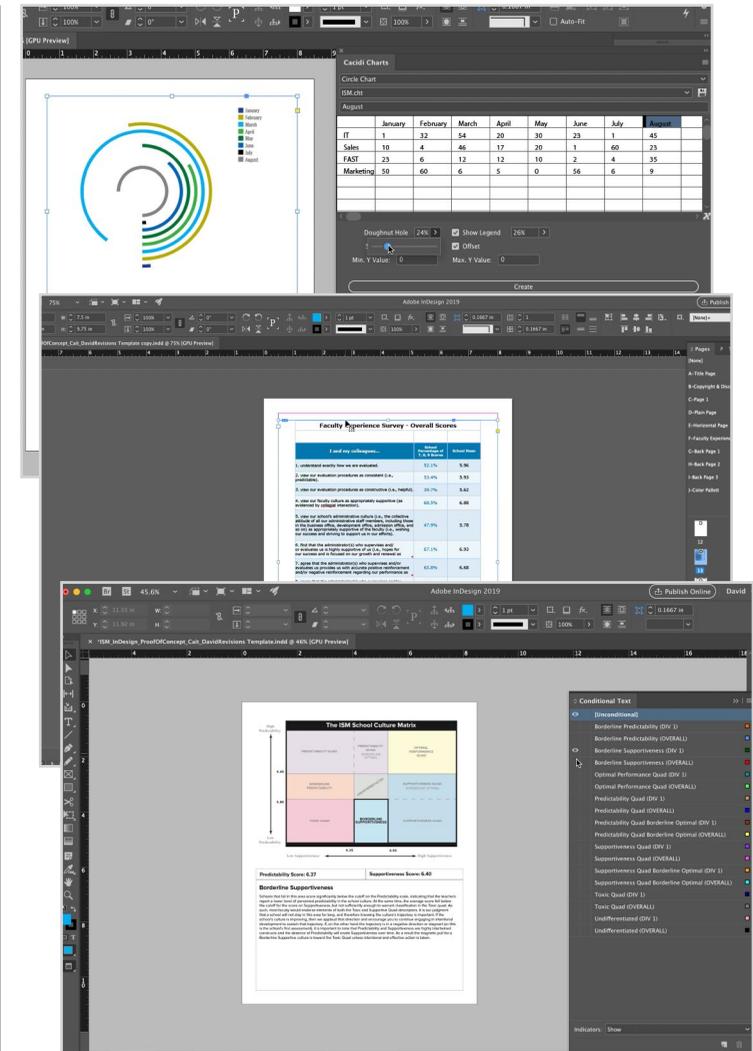
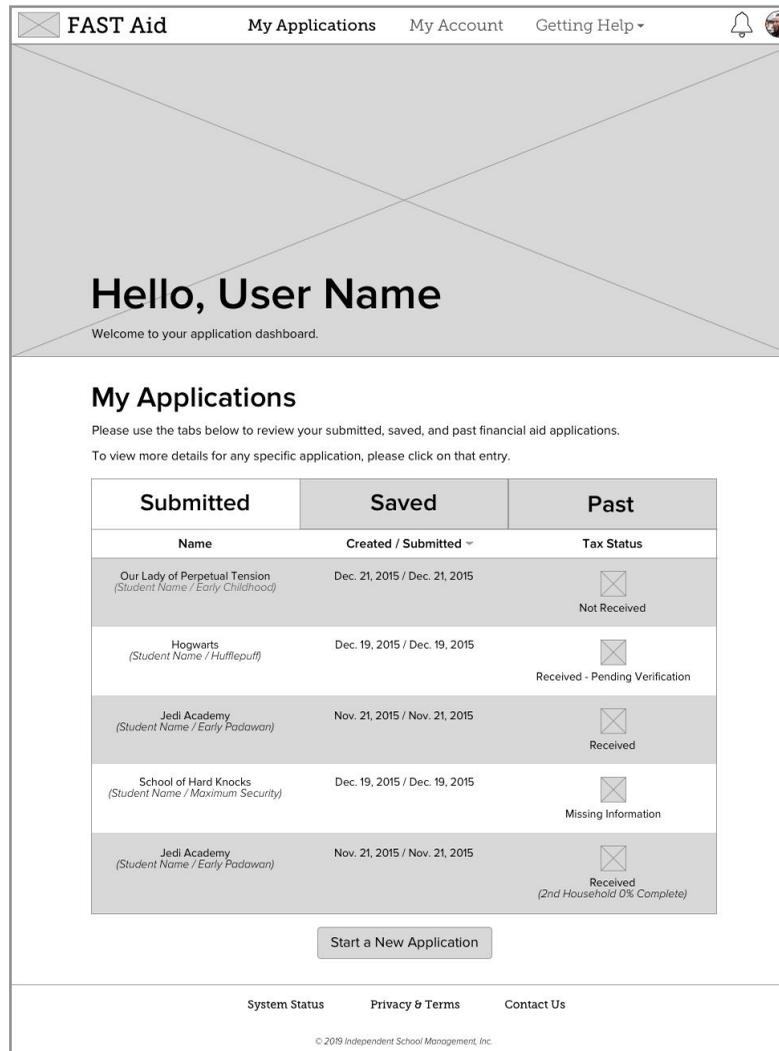
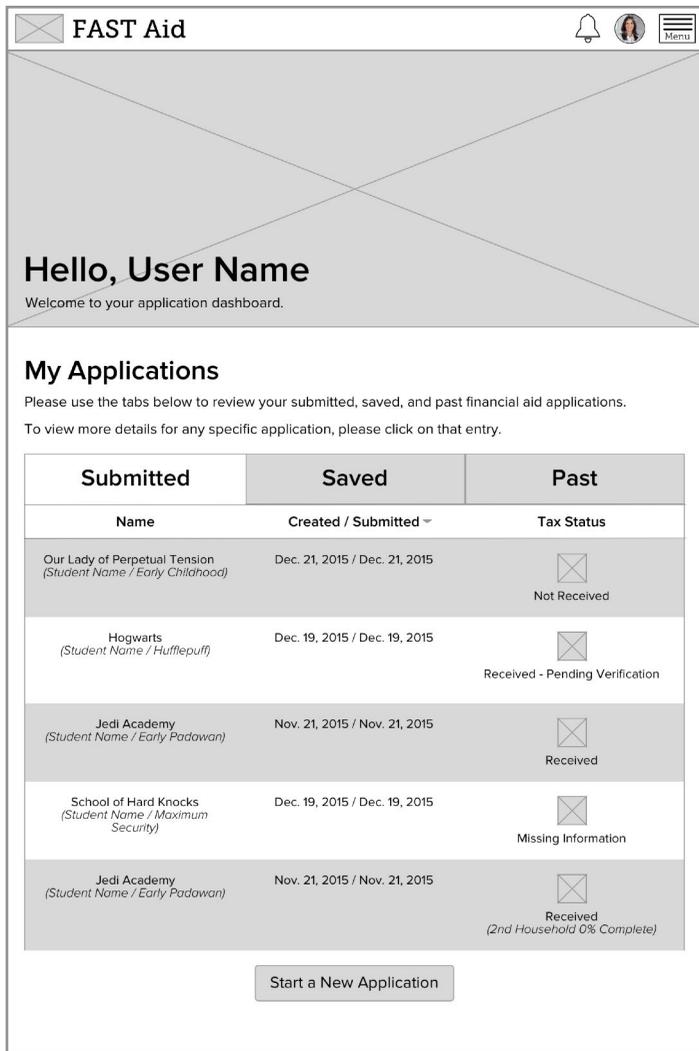
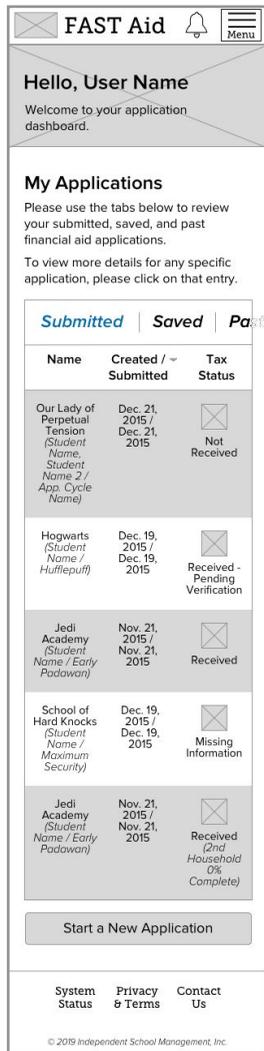
"Entry" Products & Services
UNLIMITED SCALING: Generative Surveys (Standard).
LIMITED SCALING: Generative Surveys (Custom), Consultancy Services.

"Enticement" Products & Services
UNLIMITED SCALING: "Industry" Articles, Email Newsletter.
LIMITED SCALING: "Membership" Articles, Books, Events.

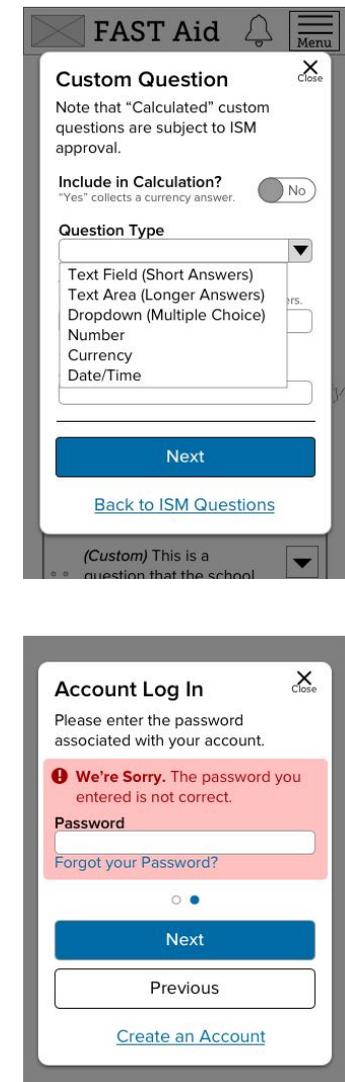
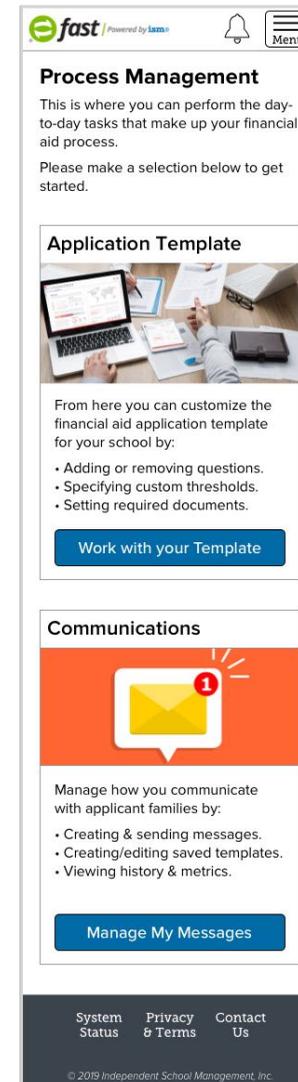
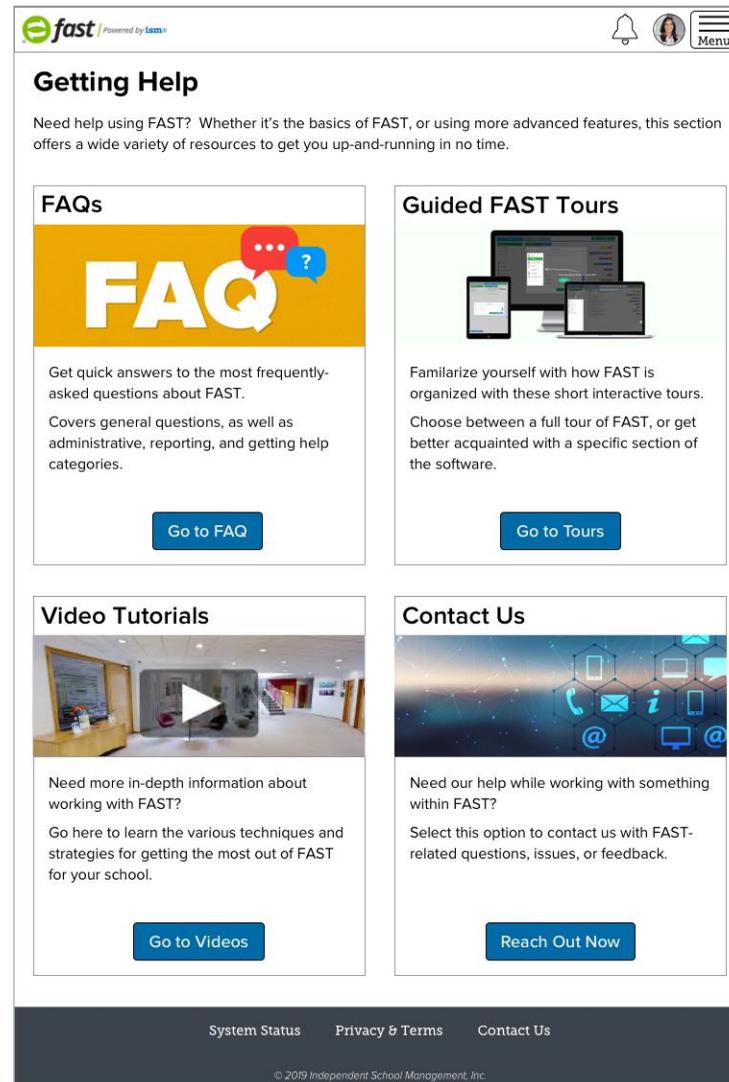
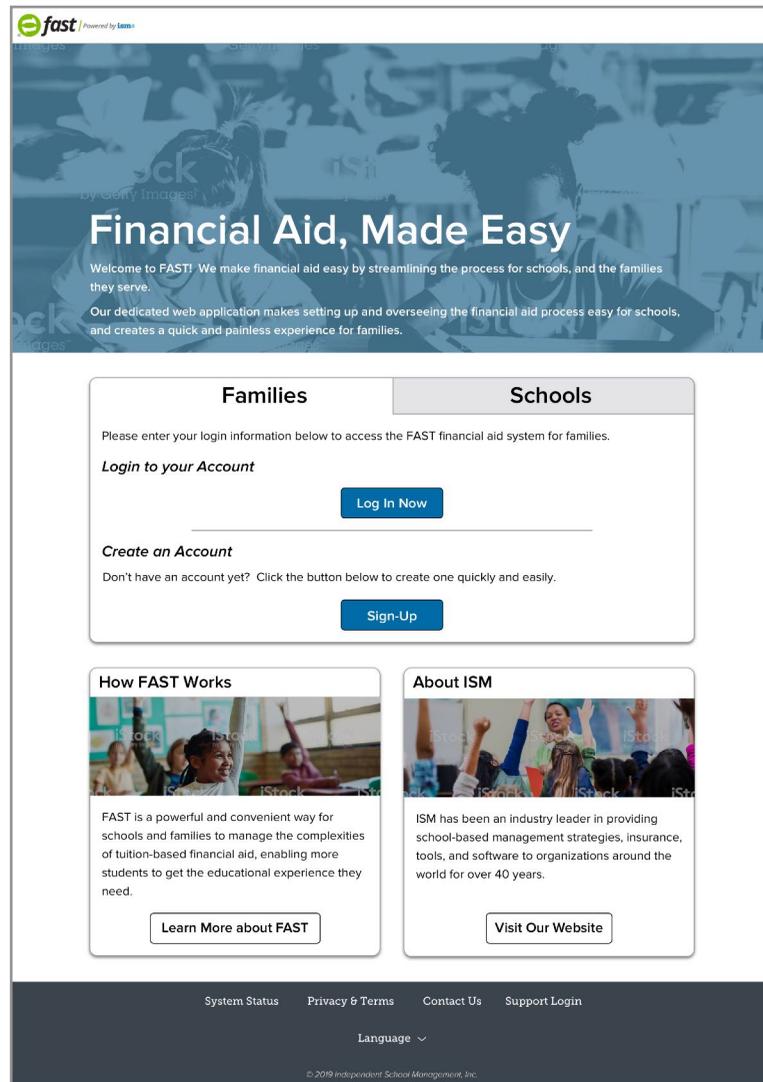
Personas & "Vertical Integration" Analysis - In addition to specific project deliverables, an on-going analysis of ISM's market "vertical" was produced to elicit stakeholder feedback, keep project teams aware of how their work tied in to other areas of the company, and help direct limited resources to where they could be most profitably used.



User-Story Maps & Process-Flows - For purely digital products we were able to chart our content & functional requirements across a shared user-story map, while for more complex multi-touchpoint solutions we would use broad process flows to understand the components and their interactions before moving on to the specifics.



Wireframes, Responsive Prototypes, & Live Demos - After rough sketches were reviewed by the team, refined wireframes were produced and turned into interactive prototypes for usability-testing. For multi-touchpoint solutions, we used live demonstrations to show stakeholders each iteration of the project in action.



Branded Comps & Layouts - Before being passed off to the Development Team for production, finalized layouts (and any dependent states for those layouts) were produced and shared to minimize scope drift and avoid potential rework.

Testing & Validation

With each of our projects needing to reach a high bar for success, usability-testing and product validation was key.

Utilizing storyboards, interactive demos, and prototypes, we were able to gather invaluable feedback from users before finalizing designs that were handed-off to our development partners.

Deliverables Included:

- Usability-Testing.
- Process Feedback.
- Project Reviews with Stakeholders.

SORTING & TAGGING STUDENT APPLICATIONS

Need for clearer differentiation between Bins & Tags.

- Bins are used to store a broad category of applications (i.e. incomplete, pending, approved, etc.), and can be partially customized.
- Tags are used to convey more granular attributes (i.e. "Check Up Later", "More Info Needed", etc), and are fully customizable by users.

"At first I was a bit confused why I'd need to organize applications more than once...but now that I see how it works, keeping track of so many different applications will be so much easier."

Recommendations

- Establish the difference between Bins & Tags early on in the visual hierarchy of the User-Interface, and keep this hierarchy consistent throughout this (and future) software products.
- Plan for future education resources to highlight and explain this set of features.

Incomplete Applications

If you wish to help an applicant by having your organization pay for their incomplete application below.

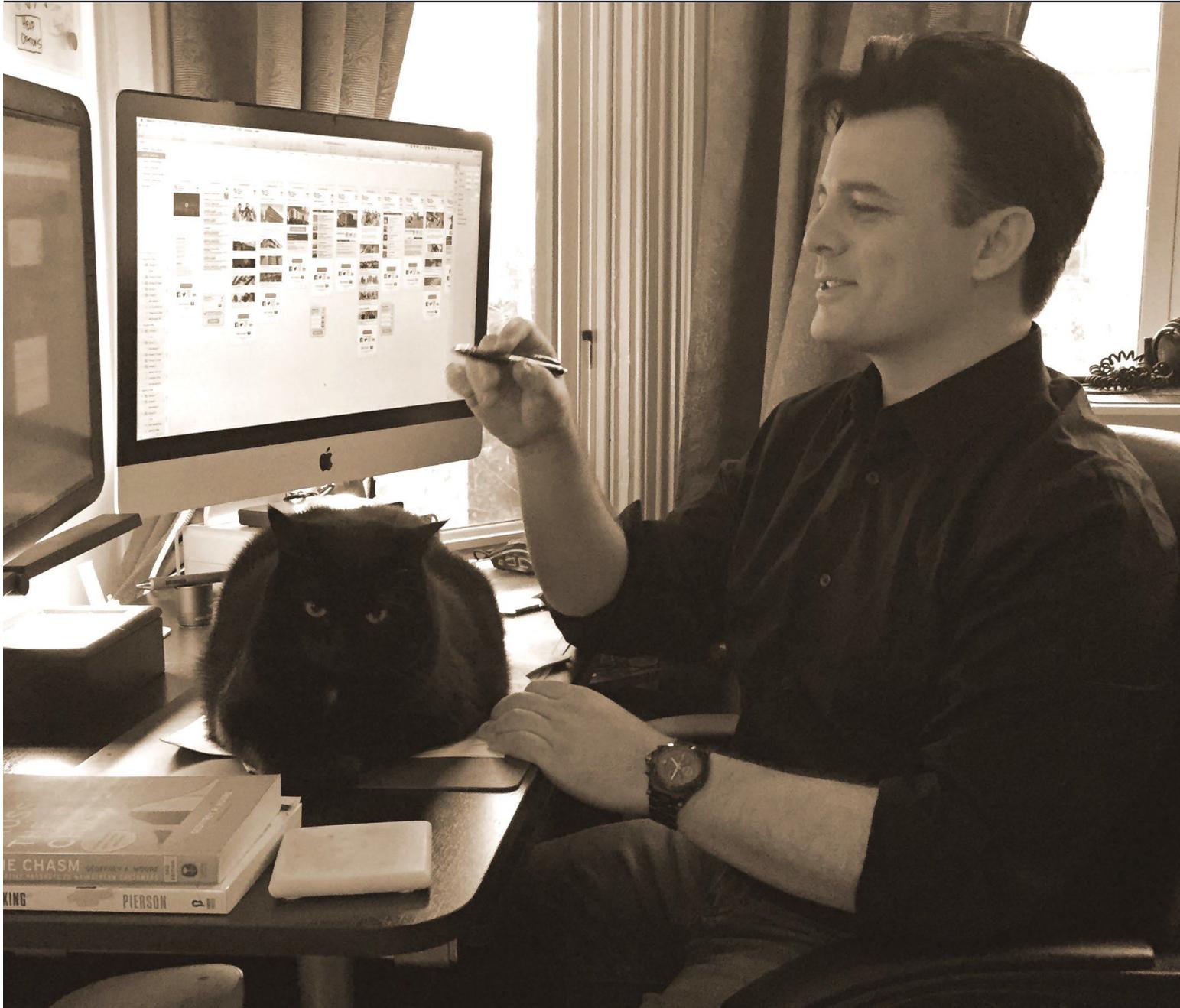
[Show Incomplete Applications](#)

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An operations-level user moving through the prototype interface to view applications at different stages of completeness.

Usability-Testing & Stakeholder Reports - Each design stage in our "agile" process was rigorously tested with users, with the resulting feedback being the basis for redesigns and comprehensive monthly progress updates for stakeholders.

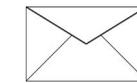


Thank you for your interest.

If you'd like me to help with your next project, or have any questions about my work, experience, or accomplishments, feel free to get in touch.



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